Travel, Lodging and Meals

Authority: Vice Chancellor for Business Affairs


Source of Authority: Office of State Budget and Management

Related Links: Appendix A ‘Rate Table – Transportation, Lodging and Meals’

Responsible Office: Controller’s Office/Disbursements Office

I. Purpose

Defines the payment, by the university, of expenses for lodging and meals for official university travel.

II. Scope

Applies to all university departments and activities.

III. Policy

A. General Statement

1. Official travel for the university may result in expenses in addition to transportation. Anticipated lodging and meal expenses must be authorized on the Pre-Approval Travel in Chrome River, found at MySeaport, prior to the beginning date of travel.

2. Reimbursement is limited to personal costs incurred by the employee making the claim. Receipts and/or written statements are required to be uploaded to the Travel Expense Report in Chrome River found at MySeaport.

3. All documents substantiating travel shall be on file with the Disbursements Office.

4. Notes regarding travel by non-state employees

   a. Travel by non-state employees requires a Pre-Approval in Chrome River.
b. Non-state employees must abide by the same statutory reimbursement regulations, documentation requirements, and other conditions as state employees, unless otherwise indicated.

B. Employee Responsibility

An employee traveling on official business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of official business are not acceptable under this standard. Employees will be responsible for unauthorized costs and any additional expenses incurred for personal preference or convenience.

C. Penalties and Charges Resulting from Cancellations and or Changes

1. If the employee's travel has been approved in advance and the cancellation or change is made at the direction of (and for the convenience of) the department, any penalties and charges resulting from the cancellation of reservations shall be the department's obligation.

2. If the cancellation or change is made for the personal benefit of the employee, it shall be the employee's obligation to pay the penalties and charges.

3. However, in the event of accidents, serious illness or death within the employee's immediate family, or other critical circumstances beyond the control of the employee, the department can pay the penalties and charges.

IV. Procedures

Record expenses for lodging and meals on the Pre-Approval and on the Travel Expense Report in Chrome River. Indicate specific departure and arrival dates and times, and upload appropriate documentation to substantiate lodging expenditures as noted below.

A. Lodging

1. Lodging Reimbursement Criteria

   a. Lodging will not normally be paid when the traveler is in travel status less than 24 hours.

   b. Travel must involve a travel destination located at least 35 miles from the employee’s regularly assigned duty station or home, whichever is less, to receive approved reimbursement.
c. Indicate specific dates of lodging on the Pre-Approval in Chrome River and on the Travel Expense Report in Chrome River to document eligibility for lodging reimbursement.

2. Reimbursement Amounts for Lodging

   a. Reimbursement for lodging shall be made for only the actual lodging expense incurred. Therefore, upload the itemized receipt from a commercial lodging establishment to the Travel Expense Report in Chrome River.

   b. Reimbursement shall not exceed the per diem lodging rates listed in Appendix A without prior approval as noted below under excess lodging.

   c. Reimbursement to employees sharing a room with a member of his or her family shall not exceed the single occupancy rate.

   d. Payment of sales tax, lodging tax, local tax, or service fee applied to the cost of lodging is allowed in addition to the lodging rate and is to be paid as a lodging expense.

   e. When express checkout is used, the receipt must show credit card as method of payment.

3. Excess Lodging

   a. The department head or chairperson may authorize lodging in excess of the per diem lodging rates in Appendix A if more economical accommodations are not available or practical.

   b. Justification must be provided stating why the higher cost and supporting documentation must be uploaded to Travel Expense Report.

   c. No excess lodging may be granted for internal department meetings, conferences, seminars, etc. Such meetings must be held in university facilities when available.

   d. Request approval for excess lodging for state employees on the Pre-Approval in Chrome River.

   e. Request approval for excess lodging for non-state employees on the Travel Pre-Approval and Expense Report in Chrome River.

4. Third Party Lodging
a. Reimbursement for lodging in an establishment that is being rented out by a third party or an establishment that is not a regular hotel establishment is not allowed unless approved by OSBM in advance of the travel for which third party lodging is requested.

b. Third Party lodging also refers to campgrounds, campsites including National and State parks, Air BnB, Bed and Breakfasts, apartments and condos.

c. In each case where third party lodging is being considered, the applicant must provide the Disbursements Office all details regarding the arrangements, including the following:
   i. Purpose of having to rent the establishment
   ii. Provide evidence of savings to the state
   iii. Amount of the rental
   iv. Length of stay
   v. List of everyone staying on the property
   vi. Funding source being used
   vii. Copy of rental agreement
   viii. The traveler must attest in writing that there is no conflict of interest (no family members own the property or benefit financially from the rental)
   ix. OSBM Exception Form
   x. Forward the above information to Chrome River Disbursements Supervisor

5. Lodging in State-Owned Facility

When an employee stays in a state-owned facility and the lodging charge is less than the per diem rate in Appendix A (see ‘Related Links’ above), the maximum amount reimbursed will be the actual amount charged.

B. Meals

1. Meal Reimbursement Criteria

   a. Reimbursement for meals is normally allowed only when overnight travel is involved and when the travel destination is located at least 35 miles from the employee's regularly assigned duty station or home, whichever is less.

   b. Indicate specific departure and arrival dates and times on the Pre-Approval in Chrome River and on the Travel Expense Report in Chrome River to document eligibility for meal reimbursement.

   c. All tips for meals are included in the per diem rate allowed.
d. The travel system calculates the meals based on departure and return times of travel and city/state/country of lodging.

2. Meal Reimbursement for Partial Days when Overnight Travel is Involved

Employees may receive allowances (see Appendix A) for meals for partial days of travel when the partial day is the day of departure or the day of return. To be eligible, the following criteria must be met.

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Breakfast</td>
<td>Depart prior to 6:00 a.m.</td>
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<tr>
<td>Lunch</td>
<td>Depart prior to 10:00 a.m. on day of departure, or</td>
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<td></td>
<td>Return after 2:00 p.m. on day of return.</td>
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<tr>
<td>Dinner</td>
<td>Return after 8:00 p.m.</td>
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</tbody>
</table>

3. Meal Reimbursement When Overnight Travel is Not Involved

Lunches are not normally reimbursed if travel does not include an overnight stay. To be eligible for breakfast and evening meal allowances when overnight travel is not involved, the following criteria must be met.

<p>| | |</p>
<table>
<thead>
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<tbody>
<tr>
<td>Breakfast</td>
<td>Depart prior to 6:00 a.m., and</td>
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<td></td>
<td>Extend the normal workday by two hours.</td>
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<tr>
<td>Dinner</td>
<td>Return after 8:00 p.m., and</td>
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<td>Extend the normal workday by three hours.</td>
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<td>Both breakfast and</td>
<td>When overnight travel is not involved, the employee</td>
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<td>evening meals</td>
<td>must have worked five hours longer than the normal</td>
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<td>workday.</td>
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<tr>
<td>Applies to all of the</td>
<td>The travel must involve a travel</td>
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<tr>
<td>above</td>
<td>destination located at least 35 miles from the</td>
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<td>employee's regularly assigned duty station.</td>
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4. Reimbursement for Meals at Conferences, etc.

When the cost of meals is furnished with registration fees, conference costs, or other related activities, they will be excluded from the travel reimbursement.
meal per diem, even if the traveler did not attend.

5. Reimbursement for Meals on Commercial Airline

Employees are permitted to claim meal reimbursement allowances on the Travel Expense Report in Chrome River for meals on a commercial airline, even though the meals are shown and offered as a part of the flight schedule.

6. Reimbursement for Meals at Meetings

a. A state employee may be reimbursed for meals, including lunches, when the employee's job requires his/her attendance at meetings in his/her official capacity and the meal is a pre-planned part for the entire meeting.

b. Contact the Chrome River Specialist in the Disbursements Office for additional clarification on lunch reimbursement when overnight travel is not involved.

7. Reimbursement Amounts for Meals

a. Reimbursement for meals shall not exceed the in-state limits when traveling in-state or the out-of-state limits when traveling out-of-state. (See Appendix A.)

b. Reimbursement rates listed in Appendix A include tips.

c. An employee may request reimbursement for actual expense if it is less than the rate in Appendix A.

d. Contact the Chrome River Specialist in the Disbursements Office to obtain reimbursement rates for foreign travel meals.